

## Introduction

The “How to Create an Open Market Bid from Scratch” Quick Reference Guide is designed to provide the minimum steps necessary in creating a Bid Solicitation and submitting the Bid for approval.

## Pre-Requisites

You must have the Basic Purchasing Role.

## Steps

### Step 1:

- a.) From the Home Screen once logged in click on,  
**Documents > Bids > New.**

### Step 2:

- a.) Select the **Create a bid from scratch** radio button.

#### Create a New Bid

Please select the method to create a new bid:

- ☒ Create a bid from scratch.  
☐ Clone a bid from another document.  
☐ Copy Contracts For Renewal.

Continue

Cancel & Exit

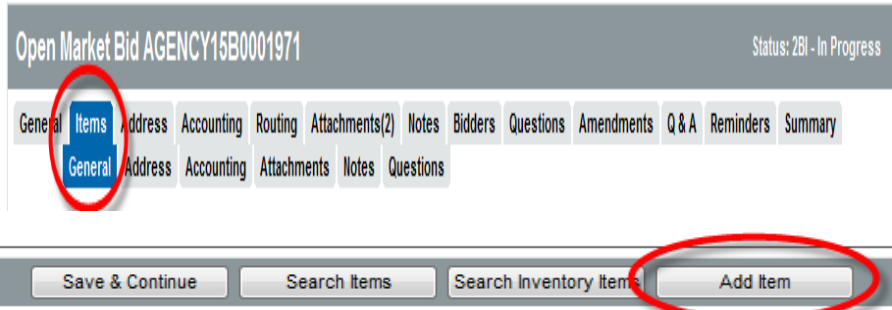
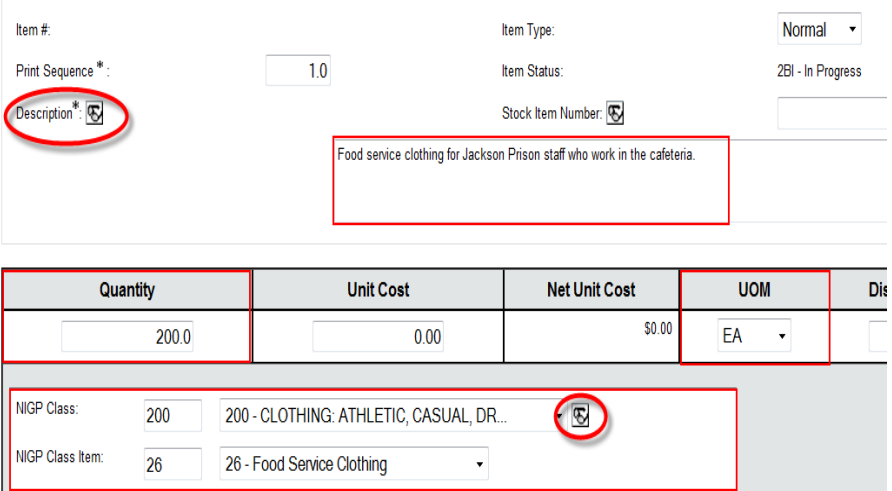
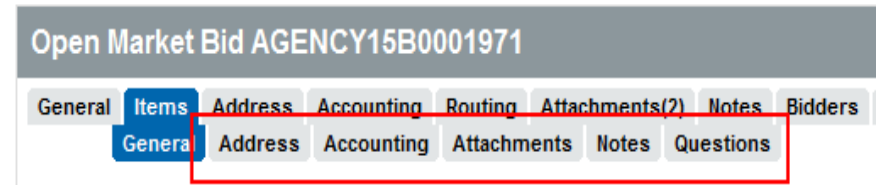
### Step 3:

The New Bid page displays, defaulted to the **General Tab**.

- a.) Enter in all required fields with asterisks \*

**At a minimum enter information in the following fields:**

Description  
 Type Code  
 Department  
 Location  
 Bid Available and Opening Date  
 Bid type (defaults as open market)  
 Purchase Method  
 Info Contact

<p>Bulletin Description Funding Source</p>											
<p><b>Step 4:</b></p> <p>Once the General Tab info. is complete, the next step is to add your Items.</p> <p>a.) Select the <b>Items tab</b> and click the <b>Add Items</b> button.</p>	 <p>Open Market Bid AGENCY15B0001971 Status: 2BI - In Progress</p> <p>General <b>Items</b> Address Accounting Routing Attachments(2) Notes Bidders Questions Amendments Q &amp; A Reminders Summary</p> <p>General Address Accounting Attachments Notes Questions</p> <p>Save &amp; Continue Search Items Search Inventory Items <b>Add Item</b></p> <p>Copyright © 2014 Periscope Holdings, Inc. All Rights Reserved</p>										
<p><b>Step 5:</b></p> <p>a.) Create a <b>Normal Item Type</b>: Enter in a description &gt; quantity &gt; UOM.</p> <p>b.) Select an <b>appropriate NIGP Code(s)</b> using the dropdown menu or the eyeglass keyword search.</p> <p><b>Note:</b> The custom fields (manufacturer, brand, etc.) near the bottom can also be used.</p>	 <p>Item #: Item Type: Normal</p> <p>Print Sequence *: 1.0 Item Status: 2BI - In Progress</p> <p><b>Description</b>: Food service clothing for Jackson Prison staff who work in the cafeteria.</p> <p>Stock Item Number:</p> <table border="1"> <thead> <tr> <th>Quantity</th><th>Unit Cost</th><th>Net Unit Cost</th><th>UOM</th><th>Dis</th></tr> </thead> <tbody> <tr> <td>200.0</td><td>0.00</td><td>\$0.00</td><td>EA</td><td></td></tr> </tbody> </table> <p>NIGP Class: 200 200 - CLOTHING: ATHLETIC, CASUAL, DR... <b>+</b></p> <p>NIGP Class Item: 26 26 - Food Service Clothing</p>	Quantity	Unit Cost	Net Unit Cost	UOM	Dis	200.0	0.00	\$0.00	EA	
Quantity	Unit Cost	Net Unit Cost	UOM	Dis							
200.0	0.00	\$0.00	EA								
<p><b>Step 6:</b></p> <p>a.) You have the option to utilize any of the <b>Sub-tabs</b> under the Items Header Tab.</p>	 <p>Open Market Bid AGENCY15B0001971</p> <p>General <b>Items</b> Address Accounting Routing Attachments(2) Notes Bidders</p> <p>General Address Accounting Attachments Notes Questions</p>										

**Step 7:**

- a.) Select the **Attachments Tab**.
- b.) Upload required documents.

## Open Market Bid AGENCY15B0001971

General **Items** Address Accounting Routing **Attachments(2)** Notes Bidders  
 General Address Accounting Attachments Notes Questions

**Step 8:**

- a.) Select the **Bidders tab**.
- b.) Select the **Lookup & Add Vendors** button.

**Note:** It is recommended to NOT select the Unrestricted or Restricted radio buttons.

The “Hide bid Holder List on Vendor Side” is also defaulted.

## Open Market Bid AGENCY15B0001971

General Items Address Accounting Routing Attachments(2) **Bidders** Questions Amendments  
 General Subcontractors Quote Activity

## Vendor Validation Warnings

- No bid bidder.

Select bidder participation, open or closed, and select vendors to notify

- ☐ Unrestricted bid, all vendors can view and respond
- ☐ Restricted bid, only selected vendors can view and respond

Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="text"/>			

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

**i** Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue

Lookup & Add Vendors

**Step 9:**

The Lookup & Add Reference Vendors page will appear.

- a.) Scroll down to the bottom of the page and **click Find Vendors for all Commodity Codes on the Bid** button.

**Note:** It is crucial that you select the appropriate button as described. This avoids email notifications going out to the wrong Vendors.

Find It

Clear

Find Vendors for All Commodity Codes on the Bid

Close Window

**Step 10:**

A list of Vendors will display.

- a.) Scroll towards the bottom of the page. Click the checkbox in the left hand corner under the **Select** column. This selects ALL the Vendors under a specific commodity code that pertains to your Bid.

**Note:** The State of MI recommends to select all Vendors under the commodity code that pertains to the service you are seeking.

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State
<input checked="" type="checkbox"/>	<a href="#">47378.0</a>	Agathos Laboratories, Inc				5201 Great America Pky. Suite 320	Santa Clara	CA
<input checked="" type="checkbox"/>	<a href="#">17583.0</a>	Argus-Hazco				46400 Continental Drive	Chesterfield	MI
<input checked="" type="checkbox"/>	<a href="#">33219.0</a>	BI Incorporated				6400 Lookout Road	Boulder	CO

**Step 11:**

The list of Vendors selected display.

- a.) Click the **Save & Continue** button.

## Open Market Bid AGENCY15B0001971

General Items Address Accounting Routing Attachments(2) Notes **Bidders** Questions Amendments  
General Subcontractors Quote Activity

Select bidder participation, open or closed, and select vendors to notify

- ☐ Unrestricted bid, all vendors can view and respond  
☐ Restricted bid, only selected vendors can view and respond

<input type="checkbox"/>	<a href="#">28046.0</a>	Bonham Heating and Air Conditioning	Bid Mailing Address: <a href="#">Add New Address</a> General Mailing Address - Mr. Dave Bonham 2441 W. M-61 Gladwin, M. 2441 W. M-61 Gladwin, MI 48624.0 US
<input type="checkbox"/>	<a href="#">33067.0</a>	Brooklyn Plumbing, Heating, & Air Conditioning Inc	Bid Mailing Address: <a href="#">Add New Address</a> General Mailing Address - Mr. Chad Hagerty P.O. Box 225 4017 Jefferson Rd. Clarklake, MI 49234.0 US

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

**i** Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

Save & Continue

Lookup & Add Vendors

**Step 12:**

- a.) Select the **Questions** Tab.
- b.) Enter in your **Question**, check whether or not you want it **Required**, and select a **Response Type** from the drop down menu.

General	Items	Address	Accounting	Routing	Attachments(2)	Notes	Bidders	<b>Questions</b>	Amendments	Q & A	Reminders	Summary
---------	-------	---------	------------	---------	----------------	-------	---------	------------------	------------	-------	-----------	---------

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input checked="" type="checkbox"/>	Are you a disabled Veteran?	YESNO

☐ Delete All

Save & Continue Reset

**Step 13:**

Select the **Summary Tab**.

- a.) Scroll down to the bottom of the Summary Tab & click the **Submit for Approval** button.

Open Market Bid AGENCY15B0001971

General Items Address Accounting Routing Attachments(2) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Submit for Approval Cancel Bid Clone Bid Print

**Step 14:**

The page refreshes to the Approval Path page.

- a.) Click the **Automatic Approval** button.

Open Market Bid AGENCY15B0001971

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

☐ Manually add approvers  
☒ Automatic approval

Please select an approver if you want to manually add approvers.

Approver  Add Approver

Save & Continue Cancel & Exit

**Step 15:**

The page defaults back to the **Summary Tab**.

- a.) Scroll down to the bottom of the page and click the **Send Bid** button.

This will notify your Vendors.

Open Market Bid AGENCY15B0001971

General Items Address Accounting Routing Attachments(2) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

**Step 16:**

The Vendor Notification Results page displays.

- a.) Scroll down to the bottom of the page and click the **OK** button.

Vendor Notification Result

Subject: Bid Notification - Bid # AGENCY15B0001948, breathalyzer testing

Email Recipients

Delivery Date: 10/09/2014 02:07:21 PM

Vendor ID	Vendor Name	Email Address
<a href="#">44178.0</a>	Great Lakes Divecenter, Inc.	Mr. David Leander (test@periscopeholdings.com)
<a href="#">47378.0</a>	Agathos Laboratories, Inc	Mr. Paul Momoh (test@periscopeholdings.com)
<a href="#">34030.0</a>	Safeware, Inc.	Ms. Anne Petrenko (test@periscopeholdings.com)

OK

Your bid will default to the **Summary Page** & should now be in "sent" status.

Open Market Bid AGENCY15B0001971

General Items Address Accounting Routing Attachments(2) Notes Bidders Questions Amendments Q & A Reminders **Summary**

Status: 2BS - Sent